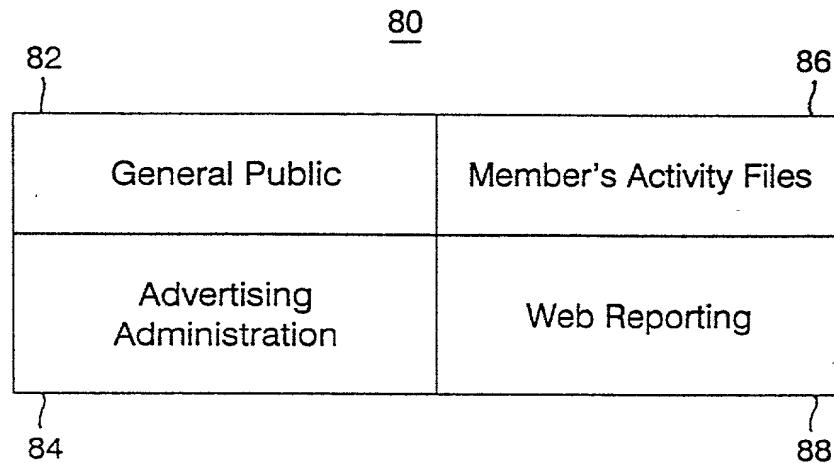


FIG. 1

**FIG. 2**

CONTACT ACTIVITY FILE

Name:	John and Susan Rand
Address:	4 Trap Falls Road
City:	New Canaan
State:	Connecticut
Zip Code:	06840

310

320

MORTGAGE		<<Edit>>	
Principal:	\$250,000.00	Monthly Payment:	\$2,500.00
Interest Rate:	9%	Start Date:	07/13/00
Term:	30	Taxes:	\$3,800
Type:	Fixed	Assessment:	\$250,000
Lender:	World Lending and Savings Bank		

330

CHECKLISTS		SAVINGS TO DATE	
Move to: >	Move from: >	Total:	\$3,532
Phase 2	Phase 5	Interior:	\$2,287
		Exterior:	\$1,245

340

CURRENT REQUESTS		
Vendor	Status	Savings
GE Appliances	Order placed - 09/14/2000	\$150
United Van Lines	Order placed - 08/22/2000	\$3000
Duct Doctors	Info Only - 07/28/2000	TBD
Twin Painting	Quote - 07/28/2000	TBD

A ----- A

FIG. 3A

A ----- A

350

MY REMINDERS	<<Add>>	
Event	Event Date	Reminder Date
My Anniversary	06/25/00	06/15/00
Call travel agent	07/03/00	Not Selected
Timmy's Birthday	08/20/00	08/15/00

360

HOME IMPROVEMENTS	<<Add>>		
Project	Vendor	Date	Savings
Kitchen cabinets	The Cabinet Company	09/30/00	\$75
Remodel bathroom	ABC Remodeling	08/26/00	\$1,000
Landscaping	Steve's Landscaping	07/14/00	\$125
Build deck	Decks, Patios & More	07/01/00	\$400

370

SETTLEMENT DOCUMENTS			
Document Name	Date	View	
HUD	07/11/00	Download:HUD (PDF:256K)	
Closing Doc	07/11/00s	Download:PDF (PDF:238K)	

FIG. 3B

400		Vendor Info		Policy																																					
				406																																					
<table border="1"> <tr> <td colspan="6">Vendor No.:3SAVON</td> </tr> <tr> <td>Vendor: William Raveis</td> <td>Office: 860 493-1447</td> <td>Status: Active</td> <td><input checked="" type="checkbox"/> Phone Directory List</td> </tr> <tr> <td>Market: Avon Placement Type: Fax</td> <td></td> <td></td> <td><input checked="" type="checkbox"/> Active</td> </tr> <tr> <td>Primary Contact: Ms. Betty Vernee</td> <td>Title: Agent</td> <td></td> <td><input checked="" type="checkbox"/> Send Placement Letter</td> </tr> <tr> <td>Extension: 860 493-1447</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Web site: test.com</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Address: 27 East Main Street</td> <td>City: Balmville</td> <td>State: NY</td> <td>Zip: 12550</td> <td>County: Orange</td> </tr> <tr> <td>Phone: 860 493-1447</td> <td>Fax: 860 677-6356</td> <td>Email: Bvernee@comp.com</td> <td colspan="2"></td> </tr> </table>						Vendor No.:3SAVON						Vendor: William Raveis	Office: 860 493-1447	Status: Active	<input checked="" type="checkbox"/> Phone Directory List	Market: Avon Placement Type: Fax			<input checked="" type="checkbox"/> Active	Primary Contact: Ms. Betty Vernee	Title: Agent		<input checked="" type="checkbox"/> Send Placement Letter	Extension: 860 493-1447				Web site: test.com				Address: 27 East Main Street	City: Balmville	State: NY	Zip: 12550	County: Orange	Phone: 860 493-1447	Fax: 860 677-6356	Email: Bvernee@comp.com		
Vendor No.:3SAVON																																									
Vendor: William Raveis	Office: 860 493-1447	Status: Active	<input checked="" type="checkbox"/> Phone Directory List																																						
Market: Avon Placement Type: Fax			<input checked="" type="checkbox"/> Active																																						
Primary Contact: Ms. Betty Vernee	Title: Agent		<input checked="" type="checkbox"/> Send Placement Letter																																						
Extension: 860 493-1447																																									
Web site: test.com																																									
Address: 27 East Main Street	City: Balmville	State: NY	Zip: 12550	County: Orange																																					
Phone: 860 493-1447	Fax: 860 677-6356	Email: Bvernee@comp.com																																							

FIG. 4A

A ----- A

420

6/14

Contacts				
Name	Title	Phone	Fax	Email
Ms. Beck Ashworth	Office Manager	203 524-3856	203 524-3866	 
Ms. June Holland	Admin Manager			
Mr. Anthony Tomlinson	Agent			
Ms. Marsha Boschen	Agent			

FIG. 4B

500

Service Available	Services Assigned
Alarm needs	Alarms
Cable	Cable TV
Card activation	Electric
Gas	Home Listing
Home findings	Insurance needs
Home inspection	Legal needs
Home mortgage	Oil
Home warranty	Painting services
Inspection	Phone services
Insurance	Phone service
Internet	Propane
Newspaper	Rental needs
	Security
	Self move
	Storage
	Storage needs
	Truck rental
	Van lines
	Vans
	Web service
	Wireless

530 ~

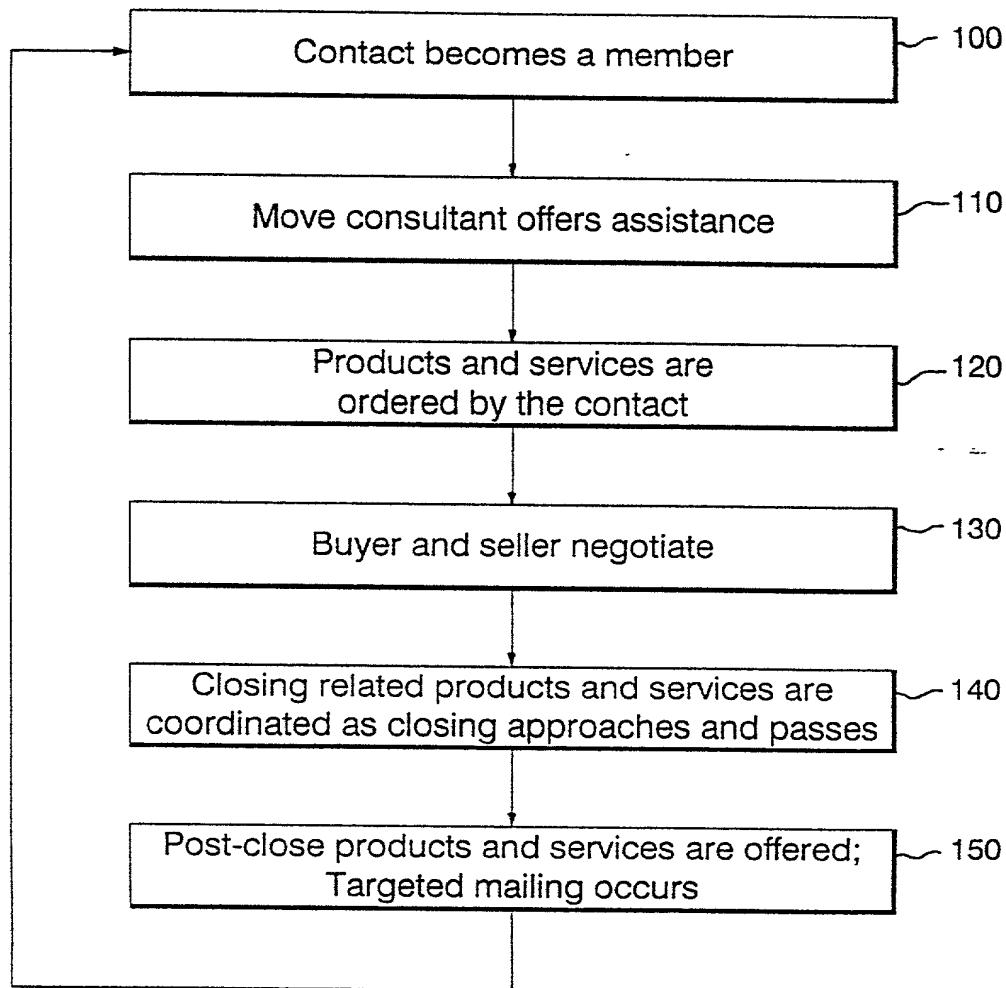
540

FIG. 5

610)										
Service: Home Findings										
Survey ID: 9843752	Agent: Ms. Barbara Pund	Vendor: William Raveis								
Move Consultant: Mary	Vendor ID: CMSAT-ug									
Extension: 104	Contact: Bart Claiborn									
620)										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 5px;">MOVE CONSULTANT</th> <th style="text-align: left; padding: 5px;"> </th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Promptness in returning calls:</td> <td style="padding: 5px;">Knowledge:</td> </tr> <tr> <td style="padding: 5px;">Explanation of Program:</td> <td style="padding: 5px;">Courtesy:</td> </tr> <tr> <td style="padding: 5px;">Overall Performance:</td> <td style="padding: 5px;"> </td> </tr> </tbody> </table>			MOVE CONSULTANT		Promptness in returning calls:	Knowledge:	Explanation of Program:	Courtesy:	Overall Performance:	
MOVE CONSULTANT										
Promptness in returning calls:	Knowledge:									
Explanation of Program:	Courtesy:									
Overall Performance:										
630)										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 5px;">VENDOR</th> <th style="text-align: left; padding: 5px;"> </th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Promptness in returning calls:</td> <td style="padding: 5px;">Knowledge:</td> </tr> <tr> <td style="padding: 5px;">Explanation of Program:</td> <td style="padding: 5px;">Courtesy:</td> </tr> <tr> <td style="padding: 5px;">Overall Performance:</td> <td style="padding: 5px;"> </td> </tr> </tbody> </table>			VENDOR		Promptness in returning calls:	Knowledge:	Explanation of Program:	Courtesy:	Overall Performance:	
VENDOR										
Promptness in returning calls:	Knowledge:									
Explanation of Program:	Courtesy:									
Overall Performance:										
640)										
<table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td style="padding: 10px;">Is there more we could have done for you?</td> </tr> </tbody> </table>			Is there more we could have done for you?							
Is there more we could have done for you?										

600

FIG. 6

**FIG. 7**

TRANSACTION TRACKING																																																						
Name:	Aiden Quinn																																																					
Address:	100 Riddle Lane																																																					
City, State, Zip:	Shelton, CT 06840																																																					
Purchase Price:	\$256,000																																																					
Est. Closing Date:	01-31-2001																																																					
810																																																						
<table border="1"> <tr> <td colspan="2">ACME REAL ESTATE COMPANY</td> <td colspan="3">Select this area to link to information relating to your sales agent.</td> </tr> <tr> <td colspan="2">888-257-3278</td> <td colspan="3"></td> </tr> <tr> <td colspan="2"><u>Contact your move consultant.</u></td> <td colspan="3"></td> </tr> </table>					ACME REAL ESTATE COMPANY		Select this area to link to information relating to your sales agent.			888-257-3278					<u>Contact your move consultant.</u>																																							
ACME REAL ESTATE COMPANY		Select this area to link to information relating to your sales agent.																																																				
888-257-3278																																																						
<u>Contact your move consultant.</u>																																																						
820																																																						
<table border="1"> <thead> <tr> <th>Stage</th> <th>Estimated</th> <th>Actual</th> <th>Completed By</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>1. Binder/Contract</td> <td>01-09-2001</td> <td>01-10-2001</td> <td>move consultant</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2. Mortgage</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>3. Appraisal</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>4. Inspection</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>5. Contingencies & Contract</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>6. Movers</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>7. Legal Closing/Title</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>8. Utilities</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>9. Insurance</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>					Stage	Estimated	Actual	Completed By	Notes	1. Binder/Contract	01-09-2001	01-10-2001	move consultant	<input type="checkbox"/>	2. Mortgage				<input type="checkbox"/>	3. Appraisal				<input type="checkbox"/>	4. Inspection				<input type="checkbox"/>	5. Contingencies & Contract				<input type="checkbox"/>	6. Movers				<input type="checkbox"/>	7. Legal Closing/Title				<input type="checkbox"/>	8. Utilities				<input type="checkbox"/>	9. Insurance				<input type="checkbox"/>
Stage	Estimated	Actual	Completed By	Notes																																																		
1. Binder/Contract	01-09-2001	01-10-2001	move consultant	<input type="checkbox"/>																																																		
2. Mortgage				<input type="checkbox"/>																																																		
3. Appraisal				<input type="checkbox"/>																																																		
4. Inspection				<input type="checkbox"/>																																																		
5. Contingencies & Contract				<input type="checkbox"/>																																																		
6. Movers				<input type="checkbox"/>																																																		
7. Legal Closing/Title				<input type="checkbox"/>																																																		
8. Utilities				<input type="checkbox"/>																																																		
9. Insurance				<input type="checkbox"/>																																																		
831																																																						
<table border="1"> <tr> <td colspan="5" style="text-align: right;">830</td> </tr> <tr> <td colspan="5"> <table border="1"> <tr> <td colspan="5" style="text-align: right;">832</td> </tr> </table></td> </tr> </table>					830					<table border="1"> <tr> <td colspan="5" style="text-align: right;">832</td> </tr> </table>					832																																							
830																																																						
<table border="1"> <tr> <td colspan="5" style="text-align: right;">832</td> </tr> </table>					832																																																	
832																																																						
800																																																						

Figure 8

11/14

920

<p>ACME REAL ESTATE COMPANY 888-257-3278 <u>Contact your move consultant.</u></p>	<p>Select this area to link to information relating to your sales agent.</p>
---	--

910

MORTGAGE

Your search for mortgage resulted in one service partner.

AMERICAN INDIAN MORTGAGE COMPANY: American Indian Mortgage Company has been providing individuals with innovative mortgage services since 1986. We are the best! Please call our 24-hour hotline for pre-approval to remove any anxieties you may have about qualifying for a mortgage.

Toll Free - 888-235-3758 Email: AmericanIndMort@srv.com Fax - 888-354-3453

<<return to home page>>

900



Figure 9

Available Services		1050	SCRIPT	1030
Air Conditioning			Thinking of Moving	
Air Duct Cleaning				
Animal Kennels				
Appliances				
Artwork				
Attorney				
Bottled Water				1040
Cabinets				
Carpet Cleaning				
Closet Organizer				
Tasks for Contact				
Task Date			Description	
01-10-2001			Introduction to Contact	
02-21-2001			Follow up on package sent	
02-22-2001			Offer mortgage pre-approval services	
Stage	Estimated	Actual	Completed By	Notes
1. Binder/Contract	01-09-01	01-10-01	agent	<input checked="" type="checkbox"/>
2. Mortgage				<input checked="" type="checkbox"/>
3. Appraisal				<input checked="" type="checkbox"/>
4. Inspection				<input checked="" type="checkbox"/>
5. Contingencies & Contract				<input checked="" type="checkbox"/>
6. Movers				<input checked="" type="checkbox"/>
7. Legal Closing/Title				<input checked="" type="checkbox"/>
8. Utilities				<input checked="" type="checkbox"/>
9. Insurance				<input checked="" type="checkbox"/>
Name:	Aiden Quinn	Licensee: ACME Real Estate		
Address:	100 Riddle Lane	Office: Shelton, CT		
City, State, Zip:	Shelton, CT 06840	Agent: Sally Andrews		
Phone:	203-293-4876	Customer Type: Buying		
Email:	quinne@aol.com	Move Consultant: Joanne Rossi		
Living Status:	own	Source: Agent		
Contact method:	email			
Property type:	Move to			
Spouse:	Jeanne			

Figure 10

<p>13/14</p> <p>ACME REAL ESTATE COMPANY 888-257-3278 <u>Contact your move consultant.</u></p>		<p>1100</p> <p>Select this area to link to information relating to your sales agent.</p>										
<p>1120</p> <p>TRANSACTION NOTES</p> <table border="1"> <tr> <td>Name:</td> <td>Aiden Quinn</td> </tr> <tr> <td>Address:</td> <td>100 Riddle Lane</td> </tr> <tr> <td>City, State, Zip:</td> <td>Shelton, CT 06840</td> </tr> <tr> <td>Purchase Price:</td> <td>\$256,000</td> </tr> <tr> <td>Est. Closing Date:</td> <td>01-31-2001</td> </tr> </table> <p>1110</p>			Name:	Aiden Quinn	Address:	100 Riddle Lane	City, State, Zip:	Shelton, CT 06840	Purchase Price:	\$256,000	Est. Closing Date:	01-31-2001
Name:	Aiden Quinn											
Address:	100 Riddle Lane											
City, State, Zip:	Shelton, CT 06840											
Purchase Price:	\$256,000											
Est. Closing Date:	01-31-2001											
<p>1130</p> <p>NOTES</p> <table border="1"> <tr> <td>Current Notes for Mortgage: 01/10/2001 Follow up on pre-approval application</td> <td>1132</td> </tr> <tr> <td>Add New Notes Call move consultant to verify w2 information.</td> <td>1134</td> </tr> </table>			Current Notes for Mortgage: 01/10/2001 Follow up on pre-approval application	1132	Add New Notes Call move consultant to verify w2 information.	1134						
Current Notes for Mortgage: 01/10/2001 Follow up on pre-approval application	1132											
Add New Notes Call move consultant to verify w2 information.	1134											

Figure 11

14/14

Date	Description	Created By
01-12-2001	Contact mortgage broker	J. Rossi

1210

1220

Notes

Collect w2 information from contact and provide same to mortgage broker.

1200

Figure 12